Notification Policies

Learn how to create and edit notification policies as well as set up print notifications. To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Notifications and Receipts, and then select the Notification Policies link.

Use the Notification Policies screen to configure notifications to be sent to patron when they have bills, holds, schedules, overdue items, or recalled items.

- Notifications are sent via email.
- The content of the notification is generated at the moment the email is sent. Changes to the Notification Policies will be reflected in emails to patrons if the email was sent after the change was saved.
- The system sends the following notifications hourly at the top of the hour:
  - Hold Expiry Notifications
  - Hold Pickup Notifications
  - Schedule Expiry Notifications

- All other notifications are sent by the system daily at 7:00 am local time. Local time is based on the time zone set on the Open Hours screen in the WorldCat Registry module.
- For patrons that do not have email addresses, the system will automatically generate print notification. For more information, see Print notifications, below.
- Libraries using Tipasa should work with their interlibrary loan department to evaluate the library's Tipasa notification settings and determine whether to use notifications from WorldShare Circulation or from Tipasa. This will prevent patrons from receiving multiple notifications for items about to be due, overdue or available for pickup.

Create or edit notification policies

1. On the Notification Policies screen, click Create New, or click the Policy Name you want to edit.
2. On the Create New or Edit Policy screen, enter a Policy Name.
3. Enter a description of the policy.
4. Select a Notification Type from the list.

<table>
<thead>
<tr>
<th>NOTIFICATION TYPE</th>
<th>DESCRIPTION</th>
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</thead>
<tbody>
<tr>
<td>Bill Notification</td>
<td>Use to notify patrons that they have accrued bills. You can configure the notification to be sent out after a set amount is reached.</td>
</tr>
<tr>
<td>NOTIFICATION TYPE</td>
<td>DESCRIPTION</td>
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| Hold Pickup Notification      | Use to notify patrons that their hold is ready for pickup.  
  - The notification is queued to be sent once the item has been checked in to fulfill the hold. An item can be checked in when it is returned, or when staff check the item in from the Pull report and Clear hold shelf.  
  - Used in Hold Fulfillment Policy.                                                                                                                                                                                                                                                                                                                                                                                        |
| Hold Request Expiry Notification | Use to notify patrons that their hold request expired before an item was found to fulfill the request or was deleted.  
  - The notification is queued to be sent once the hold request expires (the hold is no longer active in the system) or was deleted by a staff member. For more information on deleting holds, see Delete a hold from the item record and Delete a hold from a patron account.  
  - Used in Hold Request Policy.                                                                                                                                                                                                                                                                                                                                                                                       |
| Hold Shelf Expiry Notification | Use to notify patrons that their hold has expired (has been pulled from the hold shelf).  
  - The notification is queued to be sent once the item has expired from the hold shelf (the patron failed to pick up their hold during the time set in the Hold Shelf Period).  
  - Used in Hold Fulfillment Policy.                                                                                                                                                                                                                                                                                                                                                                                      |
| Schedule Expiry Notification  | Use to notify patrons that their scheduled item has expired.  
  - The notification is queued to be sent after a scheduled item has expired (the patron did not check out the item during the scheduled time).  
  - Used in Scheduling Policy.                                                                                                                                                                                                                                                                                                                                                                                             |
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<tr>
<td><strong>Schedule Pickup Notification</strong></td>
<td>Use to notify patrons that their scheduled item is ready for pickup.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent once the scheduled item is available for pickup (staff check the item in from the the Full report and Clear hold shelf).</td>
</tr>
<tr>
<td></td>
<td>◦ Used in Scheduling Policy</td>
</tr>
<tr>
<td><strong>Schedule Placed Notification</strong></td>
<td>Use to notify patrons that their scheduled item has been successfully placed.</td>
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<tr>
<td></td>
<td>◦ The notification is queued to be sent once a schedule has been placed by staff for a patron.</td>
</tr>
<tr>
<td></td>
<td>◦ Used in Scheduling Policy</td>
</tr>
<tr>
<td><strong>Loan Overdue Notification</strong></td>
<td>Use to notify patrons that their item is overdue.</td>
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<tr>
<td></td>
<td>◦ You may choose to have different overdue notices according to your loan policies. To send courtesy notices, select to send the notification before the event occurred. Subsequent notices are configured on the same notification policy.</td>
</tr>
<tr>
<td></td>
<td>◦ You may choose to assess a fee for sending an overdue notification to a patron. The fee specified will be assessed per notification, not by the number of items on the notification. To assess a fee, first create a Bill Structure for the fee and then select the appropriate Bill Structures from the Bill for sending notification drop down menu in the form. The default is to not assess a fee.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent before an item is overdue (if configured) and/or after an item is overdue.</td>
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<td></td>
<td>◦ Used in Loan Policy.</td>
</tr>
<tr>
<td><strong>Recall Notification</strong></td>
<td>Use to notify patrons that their item has been recalled.</td>
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<td></td>
<td>The notification is queued when a recall for an item is initiated. For more information, see Recall Items. Used in Loan Policy.</td>
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| **Room Schedule Placed Notification**    | Use to notify patrons that their room event has been scheduled.  
  ◦ The notification is queued to be sent once an event has been created for a room.  
  ◦ Used in Room Scheduling. |
| **Room Schedule Expiry Notification**    | Use to notify patrons that their room reservation has been canceled.  
  ◦ The notification is queued to be sent after the cancellation occurs.  
  ◦ Used in Room Scheduling. |
| **Room Schedule Reminder Notification**  | Use to notify patrons that they have a room reservation.  
  ◦ The notification is queued to be sent before the event occurs.  
  ◦ Used in Room Scheduling. |
| **Suspension Notification**              | Use to notify patrons about suspension activity.  
  ◦ The notification is sent hourly to any patrons that have had suspension time added in the previous hour.  
  ◦ Suspension notifications include details about the suspension-related events and the patron's suspended-until date.  
  ◦ Used in Patron Type Policy. |
| **Automatic Checkin Receipt Notification** | Use to notify patrons that their item has been checked in.  
  ◦ The notification is queued to be sent once the item has been checked in.  
  ◦ Used in Additional Patron Notifications. |
| **Automatic Due Date Receipt Notification** | Use to notify patrons of their item due date.  
  ◦ The notification is queued to be sent once the item has been checked out. |
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<td>Additional Patron Notifications</td>
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5. Enter a **Subject**.

6. Enter **Start Text**.
   - Do not enter more than 500 characters.
   - The system generates a list of items, based on the Notification Types, which appear between the start and end text.
   - **Optional.** Include your institution's name and contact information.

7. Enter **End Text**.
   - Do not enter more than 500 characters.
   - **Optional.** Include your institution's name and contact information.

8. Select a **Default Delivery Method** from the list.
   - Email is the only available method at this time.
   - The system sends emails from no-reply@oclc.org.

9. Select when you would like to send the notification.
   - This option is not available for Schedule Pickup Notifications or Schedule Placed Notifications.
   - For Loan Overdue Notifications, you can select to send notifications before the event occurs.

10. For Bill Notifications, enter an **amount** to trigger when the notification is sent.

11. **Optional.** To add additional notifications to the policy, click the **Add button**.

12. **Optional.** Click **Print Preview** to view the layout of the print notification. Print preview displays only the output of the first notification (Notification 1). For more information on printing notices, see **Print notifications**, below.

13. Click **Save**.

To activate a notification policy, open the **WMS Circulation** left navigation, select **Notifications and Receipts**, and then select the **Additional Patron Notifications** link. Under the Automatic Email Receipts heading, select the appropriate notification policies.

**Copy notification policies**

1. Click the **Policy Name** you want to copy.
2. In the top right corner, click **Copy**. The copied policy appears.
3. Enter a policy name and edit any additional fields.
4. Click **Save**.
Delete notification policies

Policies cannot be deleted if they are in use.

1. Click the **Policy Name** you want to delete.
2. In the top right corner, click **Delete**.
3. On the Confirm window, click **OK**.

Print notifications

The following applies to all **Notification Types**:

- Printed notifications will be created for any patron account that does not contain an email address. For more information, see [Set up print notifications](#), below.
- Printed notifications use the standard regional paper size as its single default format:
  - A4 (210 x 297 mm): Australia, Europe, South Africa, New Zealand
  - Letter (8.5 x 11 inches): United States, Canada
- The default format accommodates the most commonly available windowed envelope in each region.

Set up print notifications

In order to set up notifications for printing you need:

- The **WMS Circulation API**, available on the OCLC Developers Network
- A valid WSKey. For more information on WSKeys and how to request one, see [Authentication and Authorization](#)

For information on how to create an application for managing print notifications, see the solution guide [Notification Management Application](#).

Related policies:

Notification Policy is used in:

- Hold Request Policy
- Hold Fulfillment Policy
- Loan Policy
- Patron Type Policy
- Scheduling Policy